



Below is a draft for the **Meeting Preparation Checklist** designed for families and caregivers. This checklist can help you get organized before, during, and after meetings with educators, school counselors, or other support professionals to ensure your loved one's needs are effectively communicated and addressed.

Meeting Preparation Checklist

Purpose:

This checklist is a tool to help you prepare for meetings (e.g., IEP/504 meetings, transition planning sessions) so you can confidently advocate for your loved one and keep track of important information.

Pre-Meeting Preparation

Review Relevant Documents:

Read through your child's current IEP, 504 Plan, or any recent evaluations.

Note any updates or areas of concern that you want to discuss.

Set Clear Goals:

Write down the key outcomes you want to achieve (e.g., clarification of accommodations, update on progress, discussion of transition plans).

List specific questions or topics that need addressing.

Gather Supporting Materials:

Compile recent school reports, progress updates, or any work samples.

Bring any documentation that supports your requests or observations.

Plan Your Talking Points:

Prepare a brief outline or script of what you want to say.

Consider role-playing the conversation with another family member or advocate for practice.

Confirm Meeting Logistics:

Verify the meeting time, location (or virtual platform details), and attendees.

Ensure you have all necessary contact information.

During the Meeting

Engage Actively:

Introduce yourself and clearly state the purpose of the meeting.

Present your prepared questions and concerns in a calm, organized manner.

Take turns speaking; allow others to share their perspectives.

Document Key Points:

Bring a notebook or device to record important details, agreements, and next steps.

Ask for clarification on any unclear points.

Confirm Next Steps:

At the end of the meeting, summarize the agreed-upon actions.

Ask about timelines and any follow-up meetings if necessary.

Post-Meeting Follow-Up

Review Your Notes:

Soon after the meeting, review and organize your notes.

Highlight any action items and deadlines.

Send a Summary Email:

Draft an email summarizing the discussion and confirming next steps.

Request written confirmation if any accommodations or changes were agreed upon.

Update Your Transition Notebook:

Add the meeting details, outcomes, and any additional reflections to your notebook.

Set reminders for follow-up actions or upcoming deadlines.

Schedule a Follow-Up:

If necessary, schedule the next meeting or call to review progress and address any unresolved issues.

This Meeting Preparation Checklist is designed to help you stay organized and proactive in supporting your loved one's educational and transition needs. Feel free to customize it further to fit your specific situation or preferences.

